

# CARES-Live Manage Users Job Aid

## **Purpose**

The purpose of this job aid is to show you how to:

- Add a User
- Access the User Profile page
- Edit a User Profile



### **Policy and Procedure Disclaimer:**

CARES-Live training materials are designed to teach you how the system works. They do not cover policies and procedures specific to your organization, or general policy from the State about child welfare practice.

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## **Manage Users Overview**

The purpose of the CARES-Live Manage Users functionality is to give State, County, and Office Administrators the ability to add users, and edit the Status and Assigned Permissions of the individuals for whom they are responsible.



### **Note:**

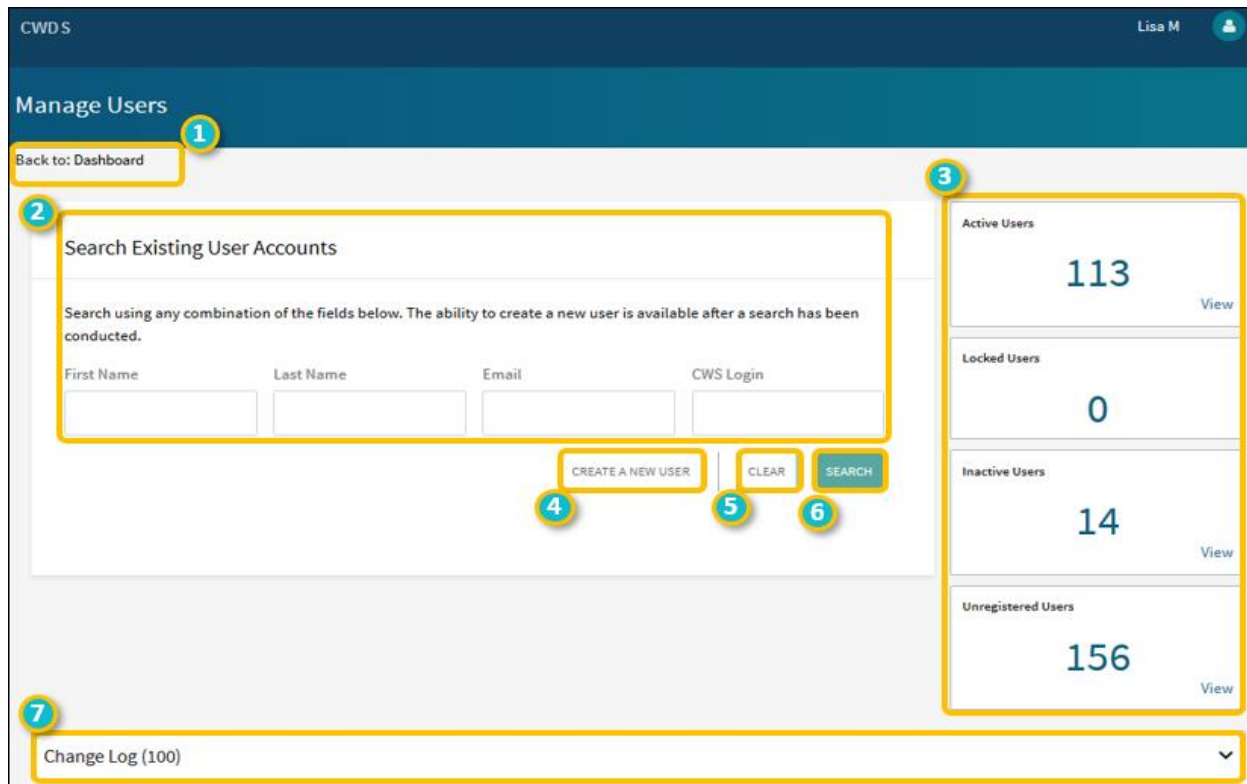
Only users who are specifically identified and assigned as Admin Users by the CWS-CARES project or by their County Administrators will be able to access the Manage Users tool.

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### **Manage Users Page Elements:**

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The screenshot shows the 'Manage Users' page in the CARES-Live system. At the top, there's a header with 'CWDS' and a user profile 'Lisa M'. Below the header, the page title 'Manage Users' is displayed. A 'Back to: Dashboard' link is highlighted with a yellow box and a blue circle with the number 1. The main content area is divided into two sections. The left section, titled 'Search Existing User Accounts', contains a search form with fields for 'First Name', 'Last Name', 'Email', and 'CWS Login'. Below the form are three buttons: 'CREATE A NEW USER' (highlighted with a yellow box and a blue circle with the number 4), 'CLEAR' (highlighted with a blue circle with the number 5), and 'SEARCH' (highlighted with a blue circle with the number 6). The right section, titled 'Quick Filter Reports', displays four user counts: 'Active Users' (113), 'Locked Users' (0), 'Inactive Users' (14), and 'Unregistered Users' (156). Each count has a 'View' link next to it. A yellow box and a blue circle with the number 3 highlight the entire 'Quick Filter Reports' section. At the bottom of the page, a 'Change Log (100)' dropdown menu is highlighted with a yellow box and a blue circle with the number 7.

#	Description
1	Breadcrumbs (links) at the top of the page allows you to return to the previous page.
2	<b>Search Existing User Accounts</b> using any combination of First Name, Last Name, Email, and CWS Login.
3	Quick Filter Reports provides a quick count of <b>Active Users, Locked Users, Inactive Users, and Unregistered Users</b> . Administrators can view a list of users from any of these links.
4	<b>Create A New User</b> option becomes available after a search is performed.
5	Use the <b>CLEAR</b> button to start a new search.
6	Use the <b>SEARCH</b> button to perform your search. Results will show exact and or similar matches.
7	<b>Change Log</b> on the Manage Users page displays changes for all users on your user list. Administrators have access to a user's profile from within the change log. Account lockouts and all phone number changes will be recorded in the change log. Only county and office administrators (not state admins) can see this change log.

## **Adding a User**

Before adding a user, CARES-Live will verify that the user does not already exist in the system to prevent adding a duplicate user. Additionally, the user must be active in CWS-CMS to pass CARES-Live validation. Once a user has been added, CARES-Live will send a registration e-mail to the individual.

You cannot add the following users:

- Users whose e-mail address already exists in CARES-Live
- Users whose CWS login is not found in CWS/CMS
- Users from counties other than your own

CARES-Live will display an alert if you attempt to add one of these types of users.



### **Note:**

It is important that you enter the user's correct e-mail address as this is where the registration e-mail will be sent. The e-mail entered also becomes their CARES-Live user ID and is used during the log in process.



### **To add a user:**

Step	Action	Result
1.	From the <b>Manage Users</b> page, click <b>CREATE A NEW USER</b> button	The <b>CREATE A NEW USER</b> page displays the Verify User card.
2.	Enter <b>CWS Login</b> and <b>Email Address</b> .	CWS Login and Email Address display and the <b>VERIFY USER</b> button is now enabled.
3.	Click <b>VERIFY USER</b> .	The <b>Add User</b> page displays the <b>Add User</b> card with the suggested user's information.
4	<b>Click ADD USER.</b>	The read-only view of the User Profile page displays with an alert that says, " <b>Successfully added new user. Registration email has been sent to [e-mail address]</b> ".

**Note:**

A search must be performed before Create A New User option becomes available.

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**Verifying the User**

When verifying the details of the CWS/CMS user you want to add to CARES-Live, you may realize it's not the correct user. In this case, you can remove and re-enter the CWS Login and/or Email Address and re-verify the user.

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**Note:**

The registration e-mail is sent to the user as soon as you click ADD USER. Therefore, it is recommended that your next step is to assign the appropriate permissions. Otherwise, if the user registers and logs in before you assign permissions, they will see a blank dashboard.

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## User Profile Page Elements:

User Profile

RESET

SAVE

Back to: Dashboard > User List

County: Madera

Full Name

Raval, Ratnesh

Office Name

CWDS Madera Testing

CWS Login

CWDS3

Role

Office Administrator

Email

donzano123+officeadmin@gmail.com

Office Phone Number

(559) 999-4321 Ext

Start Date

07/13/2017

Last Login

August 11, 2021 01:58 PM

Phone Number

9161111112

Ext

Cell Phone Number

User Status

Confirmed

User has been confirmed.

Account Status

Active

Assigned Permissions

CANS

Facility Search: Complaints

Facility Search & Profile

Snapshot

Privileges from CWS-CMS (19)

Category	Privilege
Access Authority	System Administration
Access Authority	Closed Case/Referral Update
Access Authority	SOC158 Application
Access Authority	Resource Mgmt Placement Facility Maint
Access Authority	Resource Management
Access Authority	Merge Client

Notes

Change Log (9)

Date/Time	Made By	Type	Details
June 26, 2019 01:14 PM	Raval, Ratnesh (State Administrator)	Cell Phone Change	VIEW
June 26, 2019 01:14 PM	Raval, Ratnesh (State Administrator)	Cell Phone Change	VIEW
June 26, 2019 01:14 PM	Raval, Ratnesh (State Administrator)	Cell Phone Change	VIEW
June 26, 2019 01:14 PM	Raval, Ratnesh (State Administrator)	Cell Phone Change	VIEW

#	Description
<b>1</b>	Clicking <b>RESET</b> will reset the information on the page to the last saved information. Clicking <b>SAVE</b> saves any changes made on the page.
<b>2</b>	Passwords can only be changed once in a 24-hour period. You can clear the hold by clicking <b>Clear Password Hold</b> . An alert will display that says, "You have successfully cleared the user's 24-hour password hold. Please have the user reset their password."
<b>3</b>	After 3 failed login attempts, a user will be locked out. You can unlock them simply by clicking <b>Unlock User</b> here. An alert will display that says, "Success! You have successfully unlocked this user." Please notify the user of this change."
<b>4</b>	You can select the appropriate <b>Role</b> for the user from this dropdown.
<b>5</b>	You can make any needed corrections to the user's <b>Email</b> here. The new email will immediately be available for use as the login for CARES-Live.
<b>6</b>	You can make any needed corrections to the user's <b>Phone Number</b> and <b>Extension</b> here. The phone number field is required to save, but the extension is not. Edits made in CARES-Live for this field are not sent back to CWS/CMS. In the same way, edits made to the phone number in CWS/CMS are not sent to CARES-Live.
<b>7</b>	You can enter user's <b>Cell Phone Number</b> .
<b>8</b>	You can select either Active or Inactive for the <b>Account Status</b> .
<b>9</b>	You can select a user's <b>Assigned Permissions</b> from this dropdown.
<b>10</b>	The number in parenthesis notates how many records are listed below. In this example, there are 19 Privileges from CWS-CMS.
<b>11</b>	Clicking on a caret (^) closes the section.
<b>12</b>	A blue line indicates that the column is selected. Click the column header to change the sort order. The blue line will either display above or below the column header depending on the sort order. The default sort is either alphabetical order (e.g. Category) or most recent (e.g. Date/Time) based on the first column in the section.
<b>13</b>	Here you can view the user's <b>Privileges</b> from CWS-CMS and their corresponding <b>Category</b> .

<b>14</b>	You can enter <b>Notes</b> up to 250 characters here.
<b>15</b>	The <b>Change Log</b> displays the following information about changes, <b>Date/Time, Made By, Type,</b> and <b>Notes &amp; Details.</b> The <b>Change Log</b> records account lockouts, phone numbers, email addresses, permission changes, notes, and active status for all users on your user list. County, Office, administrators can see this change log not state admins.
<b>16</b>	Clicking <b>VIEW</b> displays the Change Log Details including email addresses, phone numbers, permissions, notes, and active status changes.

## Accessing the User Profile Page



### **Note:**

Active or Inactive status refers to access to CARES-Live only. Assigned Permissions, controls which services or features within CARES-Live a user will be able to access.



### **To access the User Profile Page:**

<b>Step</b>	<b>Action</b>	<b>Result</b>
<b>1</b>	From the <b>Manager Users</b> page, select the name of the user whose profile you want to view.	The <b>User Profile</b> page displays.

## **Searching for a User**

Your search results will have **Include Inactive** selected by default, deselect the box to get search results for active users only. You can search for more than one office name. Search results will show EXACT and or SIMILAR matches. Administrators may also see and unlock users from the Search Results.



### **New Concept: Quick Filter Reports**

Administrators have a quick count and access to:

- Active users
- Locked users
- Inactive users
- Unregistered users

The pagination functionality is another way you can search for a user. It allows you to select how many rows or users per page you want to see in the user list and allows you to navigate from page to page. Pagination always displays above the user list. Pagination displays below the user list when you select **25 rows**, **50 rows** or **100 rows**. If you enter a page number or use the up/down arrows, click **Enter** on your keyboard to see that page. You can also use the left/right arrows to view pages.

### **Editing a User Profile**

You can edit the Role, Email, Phone Number, Cell Phone Number, Account Status and Assigned Permissions. The other fields are view-only, and you cannot edit the information.



#### **To edit a User Profile:**

<b>Step</b>	<b>Action</b>	<b>Result</b>
<b>1</b>	From the <b>Manage Users</b> page, search for the name of the person whose profile you want to edit. You may also choose user from the quick filter reports.	The edit-view of the <b>User Profile</b> page displays.
<b>2</b>	Edit the following information as needed: <b>Role</b> , <b>Email</b> , <b>Phone Number</b> (including <b>Extension</b> ), <b>Cell Phone Number</b> , <b>Account Status</b> , and <b>Assigned Permissions</b> .	Edited information displays.



<b>3</b>	<b>Click SAVE.</b>	Your changes are saved and now display on the <b>User Profile</b> page. An alert displays at the top of the page that says, " <b>Your changes have been made successfully</b> ".
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### **New Concept: Assigned Permissions**

- In addition to selecting a permission from the dropdown, you can enter a known permission into the field. A list of matching permissions will display for you to select. As you enter more characters, the matching permissions displayed will narrow.
- Multiple permissions can be assigned to a user
- To remove an Assigned Permission, select X on the permission you want to remove
- A user must logout and sign in again to activate their new permissions.
- County Admin can edit other County Admins
- Office Admin can edit other Office Admins



### **Note:**

Attempting to reset password more than seven consecutive times will lock user's account. CARES-Live Service Desk will need to be contacted to release this lock. If a user has *never* logged in, and their temporary password has expired after the 7-day time period, you can resend from the User Profile page. **User Status** will show **Registration Incomplete**.

**RESEND INVITE**

Click Resend Invite to send a new registration e-mail.

**Note:****Password Policy**

CARES-Live County Administrator click the **Clear Password Hold** button in the **User List Profile**.



You have successfully cleared the user's 24-hour password hold.  
Please have the user reset their password.

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**On Demand Training**

Continue your learning experience by choosing from the following CARES-Live training materials available to you on demand:

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**Watch it!****Manage Users Demo Video**

Access this video to watch processes in action!

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## **CARES-Live Support**

If you need help using CARES-Live, follow your organization's process for requesting assistance.

Is This Job Aid Helpful?

If you have questions or suggestions regarding this Job Aid please [send an e-mail to CWDS Implementation Training \(osicwdstraining@osi.ca.gov\)](mailto:osicwdstraining@osi.ca.gov).